



Registering a New Account in the Georgia Campaign Finance System (CFIS)

(Local Filing Officer Edition – **Version 2**)





Registering a New Account

Local Filing
Officer
Information
Contact
Information
Signature
Block
Registration
Completed
Logging In
Uploading
Documents
Qualifying
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Election
Outcome
Updating
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Questions

Registering a New Account

- This is an update to original how-to guide you received on June 8, 2021.
 - I have attended a few training sessions, and I realize there is additional information I need to add to this guide.
- All the updates in this manual will be outlined in **GREEN**.
- All Local Filing Officers should have registered a new account in the new e-filing system by Thursday, July 1, 2021. If you have not registered a new account, please do so **ASAP**.
 - This includes ALL county and municipal level jurisdictions. Everyone should have an account in the new e-filing system by the time you receive this updated how-to guide.

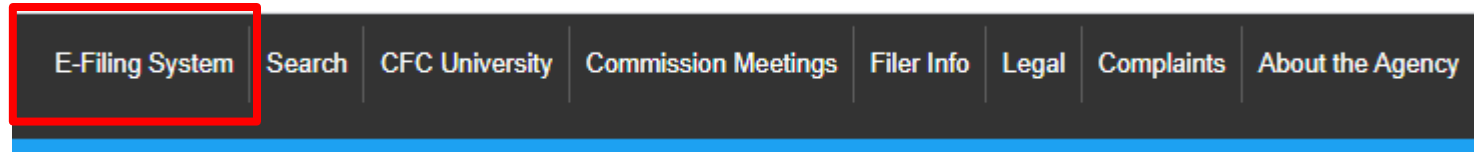


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Registering a New Account

- To register a new account, you will need to access the new e-filing system CFIS <https://efile.ethics.ga.gov/#/index>.
- You can also access the new e-filing system by going to www.ethics.ga.gov > click on **E-Filing System** > click on **New E-Filing System**



Legacy E-Filing System – Click here if you are a Lobbyist, Non-Candidate Committee (Political Party, PAC, Independent Committee, Recall Committee, or Statewide Referendum/Constitutional Amendment Committee) You can find archived records by searching our website here [[Legacy Records](#)]. Generally, the Commission has maintained electronic documents from 2006 to 2020. All physical hardcopies have a retention period of 5 years.

New E-Filing System – Click here if you are a State/Statewide filer, County and/or Municipal filer registering a campaign committee, or member of the general public.

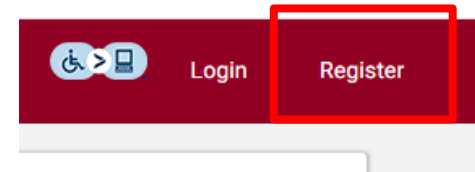


Registering a New Account

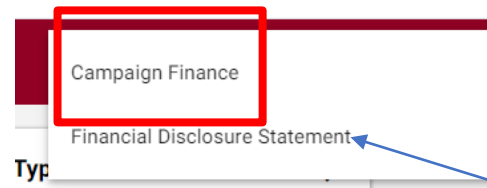
Local Filing Officer
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Registering a New Account

- In the right-hand corner, click on **Register**.



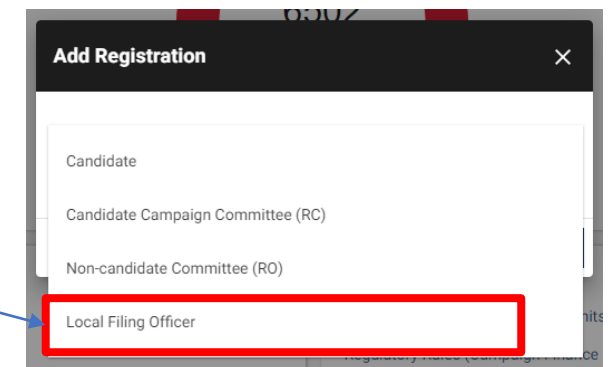
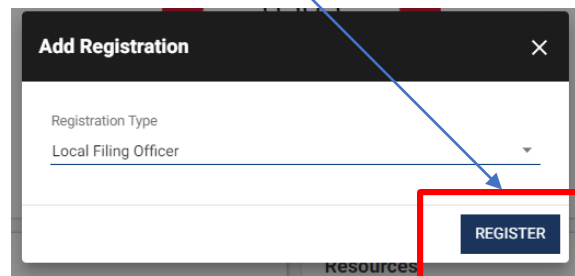
- Click on **Campaign Finance**



Do **NOT** choose the Financial Disclosure Statement option. That option is **NOT** for Local Filing Officers.

- Choose your **Registration Type**. You will choose the option “Local Filing Officer.”

- Click **Register**






Local Filing Officer Information

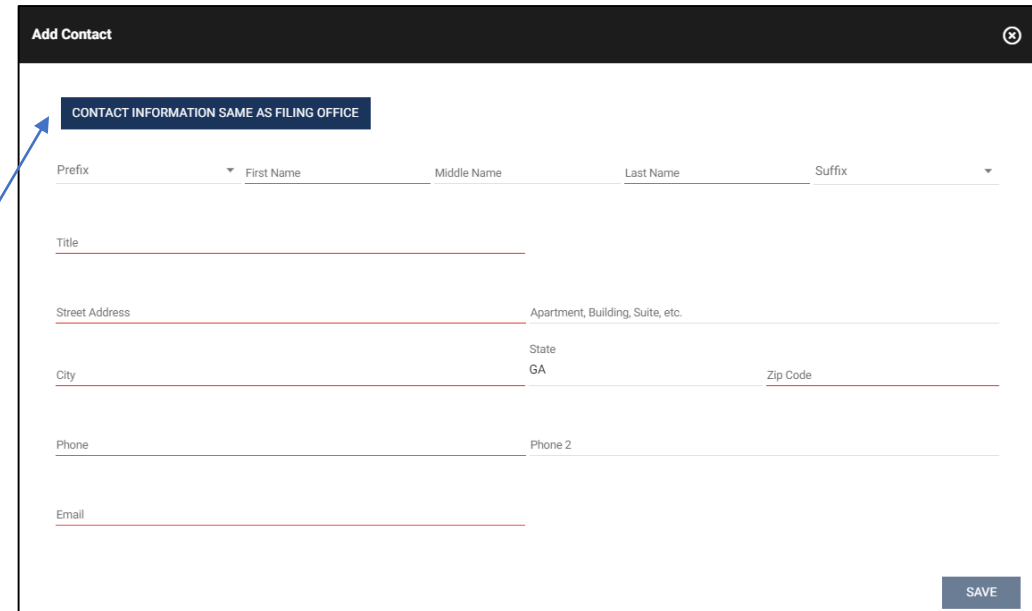
- After you click **Register**, you will be directed to the *Local Filing Officer Registration* screen.
- The first section to complete is the **Local Filing Officer Information** section.
 - Select a Local Election Office – This is a drop-down menu of all the counties and municipalities in Georgia.
 - Add your office information – This section includes the address, phone, and email to your office. Everything underlined in **RED** is mandatory.
- You can either add the physical or mailing address for the Local Filing Office.



Contact Information

- The next section to complete is the **Contacts** Information.
- Click ***Add Contact.*** 
- Another dialogue box will appear that says Add Contact.
 - Add the First and Last Name
 - Add Title
 - Add Address
 - Add Phone Number
 - Add Email

If the information for the Contact Person is the **SAME** information for the Local Filing Office, click **Contact Information Same As Committee**. If you click that button, the address, phone, and email information will auto-populate. You will still have to add the first and last name and the title information.



Everything underlined in **RED** is mandatory.



Contact Information

- After you have added all the required information, click ***Save***.
- The system allows a Local Filing Office to add up to five contacts. One contact is **REQUIRED**.
 - If you want to add additional contacts, click ***Add Contact*** and follow the steps in slide 5.
- **You will no longer use the Q number from the Legacy System.**
- The email of each contact is their username for the new e-filing system.

You will NO LONGER submit a pin application for access to the new e-filing system. The Commission will no longer accept pin applications for access to the new e-filing system.



Contact Information

- If you want to add a contact after you registered the account, follow the steps below:
 - Click on the pencil icon next to Local Filing Officer Details.
 - You will be directed to the *Amend Local Filing Officer Registration* screen.
 - Click **Add Contact**.
 - Add the new contact information.
 - Click **Save**.
 - Recheck the Attestation Box.
 - Electronically sign your name.
 - The date will automatically populate.
 - Click **Amend**.



Attestation and Signature Block

- Check the Attestation Box that states that all the information you entered is true and correct.
- Electronically sign your name.
- The date will automatically populate.
- Click ***Submit***.

☐ I do hereby swear (or affirm) that the foregoing information is complete, true, and correct to the best of my knowledge and belief pursuant to O.C.G.A. §§ 21-5-1, et. seq.; and 16-10-20.

Type Name Here

06/07/2021

Electronic Signature

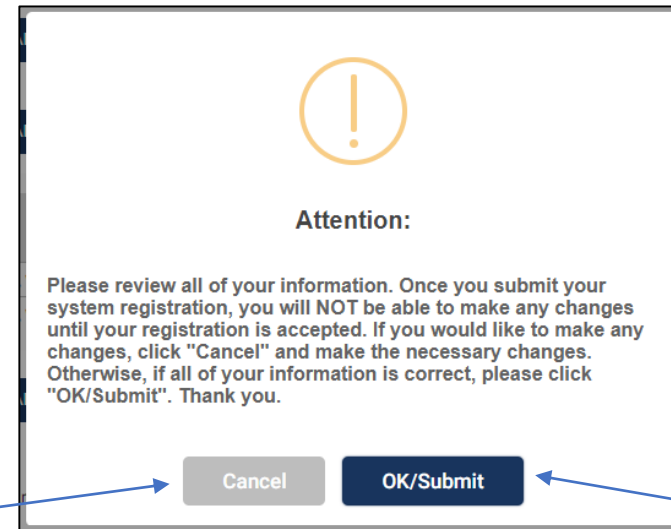
Date

CANCEL

SUBMIT

Registration Completed

- After you click Submit, you will receive a message that advises you to review all your information.



- You can click ***Cancel*** to go back and make changes or ***OK/Submit*** to submit your registration to the Commission.

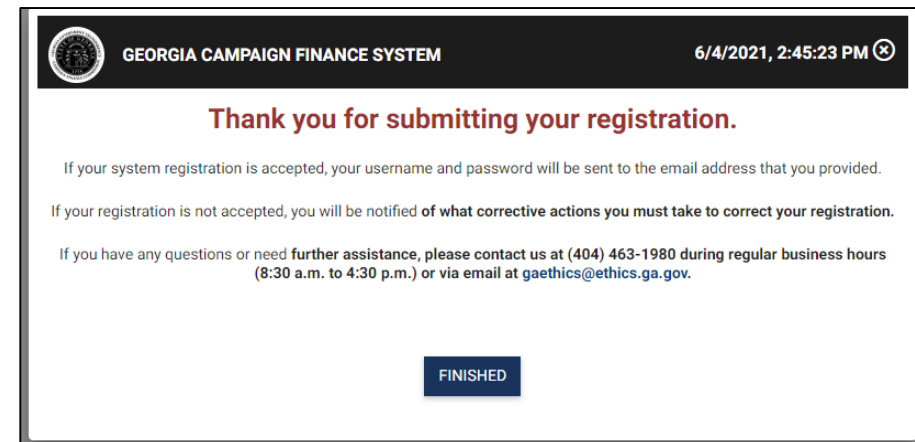


Registration Completed

- After you click ***OK/Submit***, you will receive a message that states your registration has been submitted and awaits approval from the Commission.
- After you submit your registration, you will receive **THREE** emails from the e-filing system:
 - Pending New Registration Email
 - Candidate Acceptance Email
 - Credentials Email

All emails are sent on the same day your register. Please check your junk and spam folders for these emails.

The credentials email is the email that allows you to set up your security question and password.

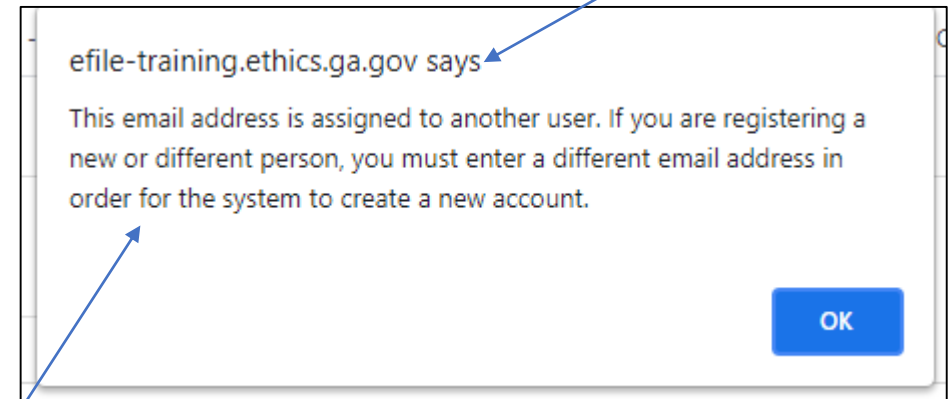




Registration Completed

- If you enter in an email that was used for another account, you will receive this message:
- Click **Ok**.
- That just tells you that the email belongs to another account. **If your email is attached to more than one jurisdiction, you will see this message.**

Getting this message does not prevent you from registering an account.



You technically should not receive this message if each contact person has their own email. If you have contacts sharing emails, you will receive this message.



Registration Completed

- The Credentials Email will have a link that will direct you to set up your password and security question information.
- The Credentials Email link is only good for **120 consecutive hours**. If you do not set up your password and security question in the allotted time, you will have to contact the Commission to resend you an authentication link.
- After you create your password and security question, you can log into the system here <https://efile.ethics.ga.gov/#/index>.



Logging into the New E-Filing System.

- Once you have set up your account, and received your login credentials, log into the new e-filing site here <https://efile.ethics.ga.gov/#/index>.
- You will be directed to the *Home Screen* of your account. Click on ***Filer's Dashboard***.

This side list your table of contents. The only links accessible to Local Filing Officers are Home, Filer's Dashboard, Public Site, and Logout.

The screenshot shows the user interface of the Georgia E-Filing System. At the top, a dark header bar contains 'Home', 'You are working on behalf of Adel.', and an 'EXIT' button. Below the header is a sidebar with navigation links: Home, Filer's Dashboard, Contributions, Expenditures, Loans Received, Investments, Contributor/Payee, Reports, Import Manager, Public Site, and Logout. The main content area is titled 'CORRESPONDENCE/DOCUMENT IMAGES' and contains a table with the following data:

Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
Credentials Email - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Adel	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Pending New Registration - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮

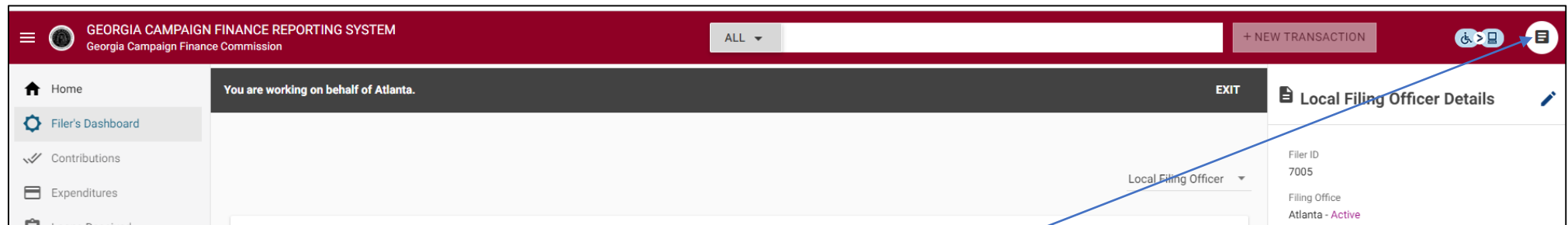
At the bottom right of the table, it says '4 results'. To the right of the table is a sidebar titled 'Local Filing Officer Details' which includes the following information: Filer ID 6829, Filing Office Adel - Active, Address 123 Adel Way, Adel, GA 30833, Email adelocalfilingoffice@mail.com, Type Local Filing Officer, and Registration ID 6587. Below this is a 'VIEW REGISTRATION' link. At the bottom of the sidebar is a section titled 'Officers' which lists 'James 0510, Susan' with status 'Active' and contact information: (480) 083-1212 and sjames@mail.com.

This side list your Local Filing Officer Details and Officers.

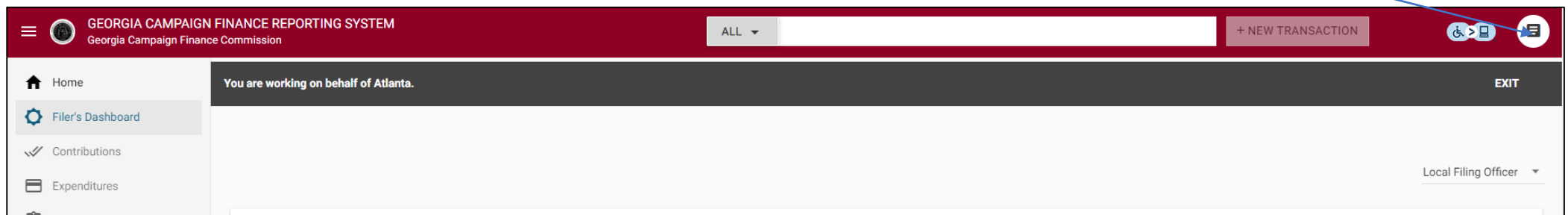


Logging into the New E-Filing System.

- If you do not see “**Local Filing Officer Details**,” then you minimized your screen. There is a simple solution to fix this.



Click on the three lines in the right-hand corner to expand or minimize the Local Filing Officer Details section.





Uploading Documents

- Local Filing Officers are required to submit copies of **ALL** campaign finance documents received to the Commission.
- Below is the schedule for when Local Filing Officers are supposed to send copies of campaign finance documents to the Commission:
 - **Form DOI:** submit a copy no later than 10 days after receipt.
 - **Affidavit of Exemption:** submit a copy no later than 10 days after receipt.
 - **Campaign Contribution Disclosure Report:** submit a copy no later than 30 days after the close of **EACH** grace period.
 - **Personal Financial Disclosure:** submit a copy no later than 30 days after the close of the reporting period.
 - **Two Business Day Report:** submit a copy no later than 10 days after receipt



Uploading Documents

- Traditionally, these documents were sent via email to localreports@ethics.ga.gov or via fax following the directions found here <https://ethics.ga.gov/efax-instructions/>.
 - **You are required to send documents via uploaded those documents to CFIS. You should not be emailing or faxing any campaign finance documents.**
- Instead of emailing the documents, the Local Filing Officer will now upload those documents to the new e-filing system.
 - The email localreports@ethics.ga.gov is turned OFF. Please **DO NOT** send anything to this email address.
 - **ALL** Local Filing Officers will use the new e-filing system to submit documents.



Uploading Documents

- In the new e-filing system on your Filer's Dashboard, click ***Upload***.

CORRESPONDENCE/DOCUMENT IMAGES

CORRESPONDENCE/DOCUMENT IMAGES **UPLOAD** Document Type ▾

Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
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- You will be directed to the *Upload Image* screen.

UPLOAD IMAGE ✕

Select File No file chosen

Document Type ▾

How Filed ▾

Document Name

Date Received 📅 Enter date ▾

Associated Statement ▾

Comments

CLEAR IMPORT



Uploading Documents

- Choose the Document Type.
 - The document types Local Filing Officers will use the most are:
 - **Local CCDR** – This **MUST** be used when uploading campaign contribution disclosure reports. **This includes the Final Report and Termination Statement.**
 - **Personal Financial Disclosure Statement** – This **MUST** be used when uploading Personal Financial Disclosure Statements.
 - **Affidavit Not to Exceed \$2,500** – This **MUST** be used when uploading the Affidavit of a Candidate's Intent not to Exceed \$2,500 in Contributions and/or Expenditures.
 - **Registration Form** – This **MUST** be used when uploading a Declaration of Intention to Accept Campaign Contributions form.
 - **Other – Public** – This **MUST** be used when uploading Two Business Day Reports, Qualified Candidate Form, and Election Outcome Information Form.
 - **Correspondence – Public** – This **MUST** used when uploading any correspondence between the Local Filing Officer and candidates and/or elected officials.



Uploading Documents

- Please note, the Commission **DOES NOT** need a copy of the following documents:
 - Notice of Candidacy and Affidavit
 - Declaration of Candidacy and Affidavit
 - Notice of Intention of Write-In Candidacy
 - Affidavit for Write-In Candidacy
 - Any other affidavit's outside of the **Affidavit of Exemption**
 - Any nomination petitions
 - Absentee ballot applications
 - Voter registration applications



Uploading Documents

- Select File.



When clicking on “Select File,” you are choosing the campaign finance document you have scanned and saved somewhere on your desktop.

- Choose How It Was Filed.

- In-Person
- Mail
- Email
- Fax

You are **NOT** allowed to choose the fax option. If you are using a third-party vendor, choose email for those documents.

- Input the Document Name.

- **ALL** Local Filing Officers **MUST** follow the naming template provided by the Education Department at the Campaign Finance Commission. There is no dropdown menu for document names. You will have to manually input that information.



Uploading Documents

- Document Name Templates
 - **Declaration of Intention to Accept Campaign Contributions (Form DOI) –**
First name, Last Name – Year | Document Name – Office Name – Election Date (Date of the Special or General Election)
 - **EX:** John Doe – 2021 Form DOI – City Commissioner, District 1 – November 2, 2021
 - **EX:** Sally Smith – 2018 Form DOI – Sheriff – November 6, 2018
 - **EX:** London Jones – 2020 Form DOI – Probate Judge – June 9, 2020

Incumbents – The election date for the Form DOI, is the original election date from when they **FIRST** filed the Form DOI. Incumbents **DO NOT** file a new Form DOI every time they qualify if they are running for the same office. If they are running for a different office, then they would file a new Form DOI.

Candidates – The election date for the Form DOI, is the future election date they will be a candidate for.



Uploading Documents

- Document Name Templates

- **Local CCDR** – *First name, Last Name – Year / Document Name – Office Name – Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2021 June 30th Non Election Year CCDR – County Commission, District 1 – November 3, 2020
 - **EX:** Sally Smith – 2019 December 30th Non Election Year CCDR – Sheriff – November 6, 2018

Incumbents– The election date for CCDR's, is the future election date they will be a candidate for. Should they win their election, they will start filing CCDR's for the next election they will be a candidate for.

Candidates – The election date for CCDR's, is the future election date they will be a candidate for. Should they win their election, they will start filing CCDR's for the next election they will be a candidate for.



Uploading Documents

- Document Name Templates
 - **Personal Financial Disclosure Statement** – *First name, Last Name – Year / Document Name – Office Name*
 - **EX:** John Doe – 2020 Personal Financial Disclosure Statement or PFDS - Coroner
 - **EX:** Sally Smith – 2019 PFDS – Sheriff
 - **EX:** London Jones – 2020 PFDS – Probate Judge

Incumbents – The PFDS is filed by incumbents/elected officials **ONLY**. Candidates for office who are not elected officials are **NOT** required to file the PFDS. Should that candidate win, they will file the PFDS the following year.

The PFDS is **ALWAYS** filed for the preceding calendar year. For example, any incumbent that files a PFDS in 2021 filed a 2020 PFDS.



Uploading Documents

- Document Name Templates
 - **Final Report and Termination Statement** – *First name, Last Name – Year / Document Name – Office Name*
 - **EX:** John Doe – 2020 Final Report and Termination Statement - Coroner
 - **EX:** Sally Smith – 2021 Final Report and Termination Statement – City Council, District 1
 - **EX:** London Jones – 2017 FRTS – Mayor
 - **Affidavit Not to Exceed \$2,500** – *First name, Last Name – Year / Document Name – Office Name – Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2018 Affidavit of Exemption or Affidavit Not To Exceed \$2,500 – Tax Commissioner – November 6, 2018
 - **EX:** Sally Smith – 2017 Affidavit of Exemption – Mayor – November 7, 2017



Uploading Documents

- Document Name Templates
 - **Two Business Day Report**– *First name, Last Name – Year | Document Name – Office Name - Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2020 Two Business Day Report or TBDR – Coroner – November 3, 2020
 - **EX:** Sally Smith – 2021 TBDR – Mayor – November 2, 2021
- The naming template is **NOT** optional. You must following the naming template when uploading documents to the new e-filing system.
- Choose the Date Received.
- If you have any comments that you want to add, add them to the Comments section.
- Click ***Import***





Uploading Documents

- After you import your documents, they will appear under the *Correspondence/Documents Images* tab.

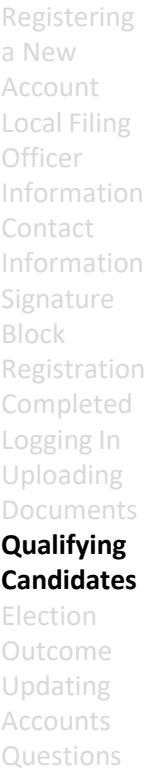
Linda J. Davis - 2020 - Personal Financial Disclosure Statement - Council Member	Personal Financial Disclosure Statement	06/30/2021	Public
Hattie R. Portis-Jones - 2020 Personal Financial Disclosure Statement - Council Member	Personal Financial Disclosure Statement	06/30/2021	Public
Elizabeth Carr-Hurst - 2020 - Personal Financial Disclosure Statement - Mayor	Personal Financial Disclosure Statement	06/30/2021	Public
Andrew James Whitmore - 2020 - Personal Financial Disclosure Statement - Council Member	Personal Financial Disclosure Statement	06/29/2021	Public
Mario B. Avery - 2021 - Declaration of Intention to Accept Campaign Contributions - Mayor - November 2, 2021	Registration Form	05/07/2021	Public
Elizabeth Carr-Hurst - 2021 Declaration of Intent to Accept Campaign Contributions - Mayor - November 2, 2021	Registration Form	06/28/2021	Public

- Any document uploaded in the new system will have a “Document Privacy” setting of **Public**.



Uploading Documents

- It is important to note that our system **DOES NOT** talk to third-party vendor applications i.e. EasyVote or other applications.
- If you are using a third-party vendor, you still have to upload the campaign finance documents to **OUR SYSTEM**.
- Documents should be uploaded in a timely manner. The schedule of when documents should be submitted to the Commission is on slide 16.
- Documents submitted the Commission will be visible to the public.



- Traditionally, Local Filing Officers have uploaded qualified candidate information using the QOERS system.
- That system is no longer available. Local Filing Officers will now have to upload that information to the new e-filing system (CFIS).

Qualified Candidate Information –
Election Date



Qualifying Candidate Information

- The Local Filing Officer will complete a Qualified Candidate Information Form within 10 days of the qualifying period ending. This form is submitted after EVERY qualifying period.
- You will upload the Qualified Candidate Information Form the same way you upload other campaign finance documents. You will choose the Document Type of “Other – Public.”
- You will have to input information for the:
 - Election Date
 - County and/or Municipality
 - Candidate Name
 - Candidate Address
 - Office Sought of Qualified Candidate
 - Qualifying Date



Qualifying Candidate Information

- You will fill out the Qualified Candidate Information Form in its entirety.
- Please NOTE: You **WILL NOT** upload one form per person. You will list all the candidates that qualified on the same form. If you need multiple forms, that is fine. The document is a fillable PDF, so you can type and print out as many forms as you need.
- Document Name Template
 - **Qualified Candidate Information Form** – *Name of document – Election Date (Date of the Special or General Election)*
 - **EX:** Qualified Candidates – November 2, 2021
 - **EX:** Qualified Candidate Information Form – June 9, 2020



Election Outcome Information

- Traditionally, Local Filing Officers have uploaded election outcome information using the QOERS system.
- That system is no longer available. Local Filing Officers will now have to upload that information to the new e-filing system (CFIS).

Election Outcome Information –

Election Date

County:

Municipality:

Name:	Office Sought	Election Outcome
Ex: Bob Jones	City Council, District 1	Won

Campaign Finance Commission University * Qualified Candidate Information Form * May 2021



Election Outcome Information

- The Local Filing Officer will complete a Election Outcome Information Form within 10 days of the election results being ***certified*** after EVERY election.
- You will upload the Election Outcome Information Form the same way you upload other campaign finance documents. You will choose the Document Type of “Other – Public.”
- You will have to input information for the:
 - Election Date
 - Election Outcome – Won, Lost, or Runoff
 - Candidate Name
 - Office Sought of Qualified Candidate



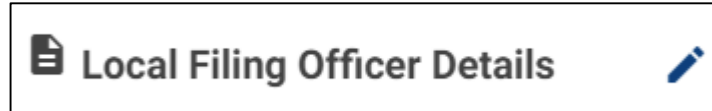
Election Outcome Information

- You will fill out the Election Outcome Information Form in its entirety.
- Please NOTE: You **WILL NOT** upload one form per election. You will list all the candidate outcomes on the same form. If you need multiple forms, that is fine. The document is a fillable PDF, so you can type and print out as many forms as you need.
- Document Name Template
 - **Election Outcome Information Form** – *Name of document* – *Election Date*
(*Date of the Special or General Election*)
 - **EX:** Election Outcomes – November 2, 2021
 - **EX:** Election Outcome Information Form – June 9, 2020

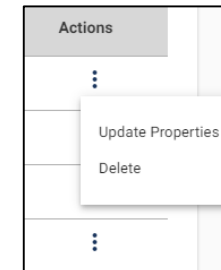


Updating Account Information

- If the Local Filing Officer needs to update the information to their account, they will log into CFIS and click on ***Filer's Dashboard***.
- Click on the pencil icon next to Local Filing Officer Details, and update the account.



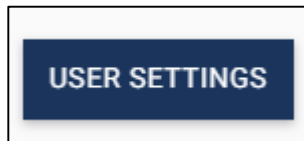
- If you need to update or delete an upload that was added in error, click on the three dots, on the line you want to update, under Action.
 - Click “Update Properties” if you want to update the name, document type, etc.
 - Click on “Delete” if you want to delete the record.



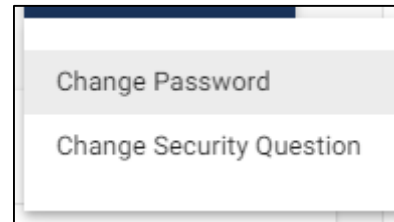


Updating Account Information

- If you want to update your password or security question, click on User Settings.



- Depending on what you are trying to update, you will click on “Change Password” or “Change Security Question.”





Questions

- Feel free to contact the Education Department at hsmith@ethics.ga.gov or 404-463-7740.
- The education help desk is available from 9:30 am – 4:30 pm.

